

Top 28 List – Professional CPM – based Project Management. Plan, schedule, negotiate, progress, communicate and lead for success.

1. Understand planning and scheduling theory and the powerful new tools, Critical Path Method (CPM), forward and backward pass, Total Float (TF), mandatory, discretionary, and external dependencies, etc.
2. Use company standards and customize the PM software for your industry, company, and division.
3. Use and share Phase templates. Don't reinvent the wheel every time.
4. **Plan top-down with your whole team and sponsor.** Once the senior team agrees on the WBS Level 1 & 2 schedules, have the sub teams break out the detail at lower levels in the WBS.
5. Break out work by Phase (Location in Construction) and Deliverable, **not** functional group at WBS Level 1. **Use Weinberg Factors in Software Development, if necessary, at WBS 1.** Negotiate for commonsense!
6. Use the TWG's "Rule of Six" to break out at the lower WBS levels, ensure you have the same order of magnitude, duration, etc. at each level in the WBS. Use days for activity durations unless you're planning a shut-down, in which case use hours.
7. Use the TWG defaults in our templates. In Microsoft Project change them in **File/Options/Schedule** for serious CPM work. Remember that Duration * Units = Work, e.g., 10 days duration *10% boss = 8 hours work. Use similar defaults in other PM Software. In Primavera many of them are already set for advanced use.
8. Correct existing activities. Right click on selected activities and choose **Information/Advanced**.
9. Change other defaults in **File/Options/Advanced** to save paper & screen space, etc. per TWG recommendations.
10. Use the Project Summary bar **Options/Advanced**, start & finish milestones, headers & footers for reports, etc.
11. When planning, use logic and durations, **not** dates. Aim for a ratio of relationships to tasks of 1.4.
12. Use Discretionary logic to avoid concurrent activities for the same resources, set priorities, increase productivity, etc. Include all stakeholders - try to avoid external dependencies like the plague. **Use Unique Resource IDs.**
13. Define your critical path well and show it in red by auto scheduling or using templates.
14. Always insert the Total Slack (TF) column. Watch for negative total float and fix it immediately.
15. Resource load using realistic percentages for senior e.g. (10%), intermediate (40%) and junior (70%) people. Set realistic limits for their workload on your project, considering other projects and non-project work.
16. Don't assume infinite resources or hire and fire. Resource level using the TWG Split Views and discretionary logic, not the software algorithm. Check logic with the TF sort, first to find missing successors.
17. Use "As Soon As Possible" 99% of the time. We do not consider it a constraint. If you must use a constraint, use only "Start No Earlier than" (SNE) or "Finish No Later than" (FNL) constraints.
18. Do not link or resource load summary bars.
19. Use contingency and share the float. Use liquidated damages or incentives at the end of each phase.
20. Fast-track or crash your schedule if warranted and consider multiple scenarios and opportunity costs.
21. **Negotiate for common sense and agree on the baseline.** *Then everything changes from planning to updating!*
22. **Update your schedule frequently relative to the Status Date.** Complete critical path activities on schedule and hold everyone accountable. Kill, postpone, or change bad projects as soon as possible. Use our TWG Update checklist as updating can be sophisticated or problematic. Archive before and after each update.
23. **Use the TWG Turnaround Document.** **The team will hold all members accountable. Hide your smile.**
24. **"Manage by exception"** just the activities that are close to critical and behind schedule. **Use Earned Value starting with SPI, e.g., TF<5d, SPI<1.0, Risk Score >0.2.** Look at **Project / Project Information / Statistics**.
25. Use Project Management software to manage all the *PMBOK® Guide* areas, Scope, Risk, Cost, EV, etc.
26. Trust and reward people for great project management and successful projects. Free up time for leadership.
27. Encourage people to get their PMP® credential and to volunteer at PMI®. Listen to people from other industries.
28. **Prioritize your projects into at least three tiers. Tier 1 projects might have zero float, Tier 2 projects two months float and Tier 3 projects six months.** Negotiate for common sense! Then portfolio management is relatively easy.

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Task Name	ID	Tier	Dur	TF	Work	Cost	Gantt Chart (N D J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D J F M)											
Portfolio A	0		795d	0d	35,784hrs	\$3,507,536	[Gantt bar for Portfolio A]											
Project A	261	1	420d	0d	4,672hrs	\$457,856	[Gantt bar for Project A]											
Project B	327	1	380d	0d	3,120hrs	\$305,760	[Gantt bar for Project B]											
Project C	700	1	784d	0d	6,080hrs	\$729,600	[Gantt bar for Project C]											
Project D	407	2	280d	20d	2,320hrs	\$227,360	[Gantt bar for Project D]											
Project E	494	2	420d	22d	3,360hrs	\$403,200	[Gantt bar for Project E]											
Project F	523	2	560d	24d	4,480hrs	\$439,040	[Gantt bar for Project F]											
Project G	552	3	495d	46d	3,960hrs	\$388,080	[Gantt bar for Project G]											
Project H	581	3	330d	48d	4,752hrs	\$258,720	[Gantt bar for Project H]											
Project I	615	3	380d	48d	3,040hrs	\$297,920	[Gantt bar for Project I]											

If you use the above approach to negotiate for commonsense and to build great teams, you decrease people problems and leadership is relatively easy. All the leadership and communications skills in the world don't do you much good if you don't have anything worthwhile to communicate and if you don't know where to lead. It's much easier and faster to plan and schedule correctly the first time than to fix a bad schedule and the phase templates are often reusable if you do them well. We generally balance the multiple constraints simultaneously. It is no good coming up with high grade scope if the time, cost, and resource demands are unrealistic. Kill or change bad projects quickly!

Apply CPM in your personal life as well as at work. It is the ultimate goal-achievement tool.

TWG Generic Schedule Template using our Rule of 6. (When you use our TWG templates remember to re-baseline.)

Task Name	RES	Dur	TF	% Complete	Work	Cost	Gantt Chart (October 21, May 1, November 11, May 21)											
0a TWG Generic Schedule Template M		393d	0d	0%	4,809.6hrs	\$338,800	[Gantt bar for 0a]											
Start Project (Please read Note.)	PM	0d	0d	0%	0hrs	\$0	[Gantt bar for Start Project]											
Phase 1	PM	33d	0d	0%	489.6hrs	\$37,600	[Gantt bar for Phase 1]											
a		8d	0d	0%	115.2hrs	\$8,400	[Gantt bar for a]											
1	Tom	2d	0d	0%	19.2hrs	\$1,400	[Gantt bar for 1]											
2	Dick	2d	0d	0%	19.2hrs	\$1,400	[Gantt bar for 2]											
3	Harry	2d	0d	0%	19.2hrs	\$1,400	[Gantt bar for 3]											
4	Mary	2d	0d	0%	19.2hrs	\$1,400	[Gantt bar for 4]											
5	Jane	2d	4d	0%	19.2hrs	\$1,400	[Gantt bar for 5]											
6	Sue	2d	4d	0%	19.2hrs	\$1,400	[Gantt bar for 6]											
Team deliverable		0d	0d	0%	0hrs	\$0	[Gantt bar for Team deliverable]											
b		6d	0d	0%	115.2hrs	\$8,400	[Gantt bar for b]											
c		6d	0d	0%	96hrs	\$7,200	[Gantt bar for c]											
d		5d	0d	0%	48hrs	\$4,000	[Gantt bar for d]											
e		6d	0d	0%	57.6hrs	\$4,800	[Gantt bar for e]											
f		4d	0d	0%	57.6hrs	\$4,800	[Gantt bar for f]											
Phase 2	PM	108d	0d	0%	1,036.8hrs	\$72,000	[Gantt bar for Phase 2]											
Phase 3	PM	60d	0d	0%	576hrs	\$42,000	[Gantt bar for Phase 3]											
Phase 4	PM	120d	0d	0%	1,152hrs	\$79,200	[Gantt bar for Phase 4]											
Phase 5	PM	120d	0d	0%	1,036.8hrs	\$72,000	[Gantt bar for Phase 5]											
Phase 6	PM	54d	0d	0%	518.4hrs	\$36,000	[Gantt bar for Phase 6]											
Project Complete	PM	0d	0d	0%	0hrs	\$0	[Gantt bar for Project Complete]											
Overhead? - If you insist!		393d	0d	0%	0hrs	\$0	[Gantt bar for Overhead?]											

This checklist is an abbreviated version from our PM and CPM class books.

We analyze and critique clients' schedules each week, mentor and help our clients in planning, marketing, negotiations, fast-tracking, claims mediation and all aspects of professional project / construction and portfolio management.

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